

Market and Economic Analysis EWG'chairs debriefing:

26th February Workshop on Relevant Markets

6th March 2014

BEREC Plenary debriefing - Brussels

Content

- 1. Situation of the EC's draft recommendation
- 2. BEREC Workshop on Relevant Markets
- 3. MEA EWG's areas of discussion
- 4. Next steps

1. Organizational aspects

- Hosted by BEREC Presidency (PTS) and organized with the collaboration of the MEA EWG
- Four parts:
 - Explanation of the draft recommendation (EC)
 - Market development in the longer term (BEREC Presidency)
 - Panel discussion on the relevant markets recommendation
 - Panel discussion on future evolution
- Aimed to BEREC Heads as well as NRAs experts and open to the EC and stakeholders
- Around 80 attendants, lively discussion

2. Stakeholders views (1/3)

ETNO	ECTA
Markets are changing (role of OTT players and inter-platforms competition)	Markets are not changing much
In favour of removal of M1&2	In favour of maintaining M1&2
In favour of a lighter regulatory approach of M3&7 (art 5 AD)	
<p>In favour of the inclusion of cable in broadband markets.</p> <p>In favour of the possibility to proceed to a geographic segmentation of M4&5.</p>	<p>In favour of the definition of a market for wholesale local access, including only physical products.</p> <p>Opposed to geographical segmentation.</p>
Opposed to the stress put on the HQ of some bitstream products leading to the definition of a HQ market.	In favour of a further segmentation within HQ market: between HQ bitstream products and terminating segments of leased lines.
In the future, yesterday's incumbent operators won't necessarily have SMP.	In the future, the economy of fixed network access won't significantly change.

2. Stakeholders views (2/3)

- *Business Customers (INTUG)*
 - Impact assessment of regulatory measures must take into account the whole economy.
 - Geographical segmentation is dangerous.
 - PSTN is still very important.
 - EU needs markets that are relevant to business.

- *Cable (Cable Group)*
 - No wholesale obligations should be imposed to cable platforms.
 - Geographical segmentation is not necessary.
 - Encouraging investment requires less regulation.

2. Stakeholders views (3/3)

- *FTTH Council*
 - VULA regulation may discourage fiber deployment.
 - Geographical segmentation is needed.
 - PSTN and M1&M2: there is not necessarily a regulatory problem.
 - In the future, regulators must envisage the copper switch-off and define the right access products for the fibre world.

- *VON (Contents and Applications)*
 - VULA products do not allow for sufficient differentiation and innovation.
 - Networks are the key bottleneck.
 - Open Internet access and non-discriminatory treatment are the key objectives.

3. Conclusions

- A good exercise of transparency, giving the opportunity to stakeholders to feed BEREC opinion.
- An opportunity to hear the end-users' perspective as well as other relevant actors such as content/application providers.
- In general, nothing not already known from stakeholders, but interesting to have them all in one room supplying arguments and counterarguments.
- Summary of views expressed by stakeholders and any written contribution from them to be shared in the EWG.